



Daily Online Calendar Policies & Procedures

REQUIREMENTS:

1. Arborists and Crew Leads must possess, a computer with email access, a printer and, a scanner.

DAILY PROCEDURES:

1. Arborists will scan all contracts and, removal forms sold daily and enter same information into the calendars daily no later than 8:00 p.m. Contracts and removal forms will be scanned in (**PDF Format or JPG Format only**).

***CONTRACTS SHOULD NEVER BE SCANNED WITH MORE THAN LAST 4 DIGITS OF CREDIT CARD NUMBER SHOWING. BLACK OUT ADDITIONAL CREDIT CARD INFO.**

2. Arborists will attach all contracts and removal forms sold daily to their daily feedback reports and email same documents to: **Mary, Fernand, Kathy and Regional Director.**

3. Arborists will log onto Evergreen on-line calendars daily and follow the following procedures:

- A. In the CUSTOMER BOX - - Arborist will enter the customers Last Name, First name.
- B. In the AMOUNT BOX - - Arborist will enter the dollar amount of the contract.
- C. In the CITY BOX-- Arborist will enter the city the work is scheduled in.
- D. In the DATE SCHEDULED BOX-- Arborist will enter, the date that the work has been scheduled for production. (THERE IS NO NEED TO ADJUST TIMES)
- E. In the END BOX—Arborist will enter the date that the work will be completed. (THERE IS NO NEED TO ADJUST TIMES)

D. Arborist will right click, on the “Attach File” icon and attach the contract for the specific customer. **This step must be repeated to attach all tree removal forms as well.**

F. Arborists will click on the SPECIAL INSTRUCTIONS icon if the job requires a Line-Drop, Date Sensitive, Time Sensitive or any other Special Instructions that the crew should know the job.

G. Arborist will click on the “Save and Close” icon.

H. An example of the calendar has been included in this Policy and Procedures Manual.

CALL BACK PROCEDURES:

In the event of a call back, the following procedures will be taken.

1. The Arborist will attach the contract of the customer for the call-back and a CALL-BACK sheet. (Example included as last page of this Policy and Procedures Manual.)
2. The Arborist will attach a standard Company document for call backs. (This standard document is located at the bottom of this document.)
3. Arborists will schedule all call backs into the calendar of the specified Trees First Crew in the same fashion as work to be produced daily. Call-backs should be produced as the **first job of the day.**

DAILY PROCEDURES FOR CREW LEADS:

1. Crew leads will log onto the Evergreen on-line calendars and print their contracts daily. Crew Leads must also print off all removal forms if applicable. **Crew Leads do not print contracts off for the following day as Contracts do change.**
2. Crew leads will mark each job that they have “COMPLETED” by checking the completed icon.
3. After marking a job completed, to exit the customers information, you must click on the Save & Close Icon.

Evergreen Tree Care, Inc. Remote Web Workplace - Windows Internet Explorer

https://mail.evergreentlc.com/Remote/default.aspx

Google Search Bookmarks Check Translate AutoFill Sign In

Evergreen Tree Care, Inc. Remote Web Workplace

Evergreen Tree Care, Inc. Remote Web Workplace

Log Off Main Menu

Home Documents and Lists Create Site Settings Help

Evergreen Tree Care, Inc.
TFC CREW GILDERSLEAVE 503-484-3301: Wolfson, Ken

Save and Close Attach File Delete Item Go Back to List

COMPLETED

SPECIAL INSTRUCTIONS

CUSTOMER * Wolfson, Ken

AMOUNT * 1,500

CITY Bainbridge Island

DATE SCHEDULED * 10/16/2009 12 AM 30
Enter date in M/D/YYYY format.

END 10/16/2009 12 AM 30
Enter date in M/D/YYYY format.

Description

Recurrence
 None
 Daily
 Weekly
 Monthly
 Yearly

Workspace Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

Internet | Protected Mode: On 100%

Inbox in mdavid_ev... Evergreen Tree Care... EVERGREEN DAILY ... 10:02 AM



CALL BACK

May 21, 2009

JANE DOE
1111 DOE BLVD
OLYMPIA, WA 99999
(360) 999-9999

Remove three branches on fir tree.

Thank you,